

# Pulse360 Launches Automatic Workflow Triggers in Partnership with Leading Wealth Management CRMs

*Eliminate things falling through the cracks*

RIVERSIDE, CA, USA, February 24, 2021 /EINPresswire.com/ -- Pulse360 today announced a new [automatic workflow triggers](#) feature that helps financial advisors avoid double work of



This new Automatic Workflow Triggers in Wealthbox that Pulse360 built instantly removes triple-work for advisors and their teams. It's amazing, and I'm glad we could help Pulse360 make this a reality!"

*Steve Carroll, Head of Product, Wealthbox CRM*

communicating with their clients/prospects and manually triggering workflows in their CRMs. Starting February 24, Pulse360 will empower financial advisors in the Wealth Management industry to attach workflows to their advice that automatically get triggered in Redtail CRM or Wealthbox CRM. Salesforce is coming soon.

"Today, Financial Advisors manually trigger workflows in their CRM after a meeting. Any time you do something manually, it takes time and has a high chance of having things fall through the cracks," said Anand Sheth, Founder and CEO of Pulse360. "Our goal in bringing the Automatic Workflow Triggers feature is to make technology work for the financial advisor, bringing efficiency and

systematization to their practices. We want to eliminate the chance of things falling through the cracks."

Financial Advisors can now use their frequently used written advice and attach a workflow from their CRM. From that point, anytime the advisor emails the same advice to their clients, a workflow will automatically be triggered in either Redtail CRM or Wealthbox CRM – removing the need to manually trigger workflows in CRMs and eliminating the chance of something falling through the cracks. With the previously released features, Automatic Task Feature and Automatic Document Attachment, financial advisors can now automate three manual activities with a click of a button – saving them over 50% of their time.

"Our combined goal is to create tremendous value for financial advisors. This new Automatic Workflow Triggers combined with Automatic Task Creation in Wealthbox that Pulse360 built instantly removes triple-work for advisors and their teams. It's amazing, and I'm glad we could

help Pulse360 make this a reality!" said Steve Carroll, Head of Product, Wealthbox CRM.

Pulse360's patent-pending Automatic Workflow Triggering technology, deeply integrated with Redtail CRM and Wealthbox CRM, brings immediate practice efficiency gains for Financial Advisors. Anand adds, "Consultants like AdvisorTouch provide amazing workflows that now can be automatically triggered – giving peace of mind to the financial advisor knowing they will deliver on their promise to the clients for an action item."

To learn and ask questions about the new Automatic Workflow Triggers or to see it in action visit: <https://www.pulse360.com/automatic-workflow-triggers/>, or schedule a demo with Anand Sheth by visiting: <https://www.pulse360.com/schedule-press/>

#### About Pulse360

Pulse360 was created to make financial advisors at least 50% more productive. Our remote-ready SaaS suite can make every aspect of fiduciary meeting prep and documentation 10X more efficient. The Company was founded in 2019 by Anand Sheth and James Hill. The Company is headquartered in Riverside, CA. Tim Jenkins, a co-founder of SendGrid and former alumni of Techstars, is on the Board of Advisors.

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